USER INSTRUCTIONS

MASTER SERVICES AGREEMENT

DOCUMENT IMAGING, MANAGEMENT, AND WORKFLOW

January 14, 2008

Supplements 1-11 are herein incorporated into this document

TABLE OF CONTENTS

INTRODUCTION

A. **PURPOSE**

This Master Services Agreement (MSA) is designed to provide Imaging, Document Management, and Workflow Project Implementation products (software) and services (programming, integration, installation, training, and maintenance) for State agencies and participating local agencies.

A local agency is any city, county, district or other governmental body empowered to spend public funds per California Public Contract Code Section 12110.

B. **BENEFITS**

1. Choice of several qualified contractors depending on the State's business needs.

2. Multiple qualified contractors that have demonstrated the ability to provide products and services throughout the State of California.

3. This MSA is deemed a competitively bid procurement, in accordance with MM 03-10, that establishes fair and reasonable prices, therefore, it is unnecessary for each State Department or Agency to conduct additional competitive procurements, unless the agency feels this agreement does not meet its needs.

4. Governmental agencies have the ability to purchase a supplier's full range of products and services as the business need arises.

C. **ORDER PLACEMENT**

For Master purchase orders, delivery of services must not exceed the end term of the Master Agreement by more than 1 year. Amendments must follow Management Memo 03-10. The the new expiration date is November 25, 2008. Published Price Lists may vary during the term of the contract. Contractors are allowed on an annual basis (MSA anniversary date) to update the published price lists with escalated pricing and additional qualified products.

D. **ORDER INITIATION**

Coordinate with the appropriate units within your agency (e.g., Procurement, Business Services, Contracts, etc.).

The Department of General Services charges the users of this contract an administrative fee. The DGS administrative fee is a specified percentage of invoiced sales. DGS shall annually set the percentage for such administrative fee and shall notify the agencies of the percentage set each year.

See the Department of General Services, Fiscal Services web page at http://www.ofs.dgs.ca.gov/price+book/p/purchasing.htm. The DGS administrative fee is not included in the cost of the services provided on this contract. Local agencies must agree to the State's administrative fee. This fee is will be billed directly to the agency by DGS.

E. **CONTRACTOR CONTACTS**

Please refer to the product matrix on page 10 for the specific product categories (A through K) and project category size (I (1-30 seats), II (31-150 seats), and III (151 or more seats) by contractor. Contractors are as follows:

*5-03-70-65 VIN #779793 Aspect Solutions, Inc. 35640 Fremont Blvd., Suite 200 Fremont, CA 94536 (800) 595-5055 x-51 Ganesh Tangellapally @ ganesh@aspectsolutions.com	***5-03-70-85 VIN #777932** Image Access West, Inc. 950 Gilman Street Berkeley, CA 94701 (800) 528-4773 Keith Wm. McCoy @ kmccoy@image0access.com
5-03-70-68 VIN #779802 Biz Tech Solutions, Inc. 2102 Business Center Drive Irvine, CA 92612 (949) 253-5880 David Foster @ davidf@4biztech.com	**5-03-70-87 VIN #779953** ImageSource, Inc. 612 5th Avenue SW Olympia, WA 98501 (206) 525-4399 x102 Neil Lindsay @ neill@imagesourceinc.com
5-03-70-69 VIN #16765 BMI Imaging 749 W. Stadium Lane Sacramento, CA 95834 (916) 924-6666 x-402 Brad Penfold @ bpenfold@bmiimaging.com	**5-03-70-90 VIN #362276** InfiniSys, Inc. 2240 Douglas Blvd., Suite 160 Roseville, CA 95661 (916) 773-5252 Dana Merino @ merino@infi-sys.com
5-03-70-75 VIN #779843 EMC/DocumentumContent Management Software 6801 Koll Center Parkway Pleasanton, CA 94566 (925) 600-5234 (925) 788-5060 Jake Dodson @ Dodson_jake@emc.com	***5-03-70-91 VIN #344467** Informatix 1740 Creekside Oaks Drive, Ste 175 Sacramento, CA 95833 (916) 830-1400 Adolph Mazzei @ Adolph.mazzei@informatixinc.com
5-03-70-80 VIN #779873 HCL America, Inc. 400 Crown Colony Drive, Suite 500 Quincy, MA 02169 (617) 328-7131 Partha Radharkrisha @ parthar@hcltech.com	**5-03-70-92 VIN #779994** LaserFiche (Compulink Mgmt Ctr) 3545 Long Beach Blvd. Long Beach, CA 90807 (562) 988-1688 James Every @ jevery@laserfiche.com
5-03-70-81 VIN #748079 Hershey Technologies 4225 Executive Square #100 LaJolla, CA 92037 (858) 458-4222 Neal Fischer @ nfischer@hersheytech.com	***5-03-70-93 VIN #779974** Matrix Imaging. 3151 Airway Avenue, Suite J-2 Costa Mesa, CA 92626 (714) 556-5600 Becky Horn @ becky.horn@matriximaginginc.com
5-03-70-82 VIN #780038 IBM Corporation 2710-S Gateway Oaks, Suite 200 Sacramento, CA 95833 (916) 230-7095 Mark Richey @ mark.richey@us.ibm.com	***5-03-70-95 VIN #694952** Netresult Inc. 10051 Trask Avenue Garden Grove, CA 92843 (714) 638-9400 Phat Bui@ pbui@netresultllc.com

5-03-70-96 VIN #747730 Novanis 5155 Rosecrans Avenue, 1199 Los Angeles, CA 90250 (818) 883-8008 Sam Stickler @ sstickler@novanis.com	**5-03-70-94 VIN #665369** Neko Industries 3017 Douglas Blvd., Suite 300 Roseville, CA 95661 (916) 774-7125 John Edmondson@ jhe@nekoind.com
*5-03-70-98 VIN #620405 Sierra Cybernetics, Inc. 1561 E. Orangethorpe Ave., Ste 205 Fullerton, CA 92831 (714) 921-1212 x-210 Carl La Plante @ claplante@sierracyber.com	**5-03-70-103 VIN #780058** tsaAdvet 4722 Campbells Run Road Pittsburg, PA 15205 (412) 787-0980 Amy Glynn @ amy.glynn@tsa.advet.com
*5-03-70-99 VIN #34295 SoftFile 1600 Tribute Road Sacramento, CA 95815 (916) 927-4211 Rich Jenness @ rjenness@softfile.com	**5-03-70-104 VIN #252787** Unisys Corporation 10850 Via Frontera San Diego, CA 92127 (858) 451-4623 Kenneth Moore @ ken.moore@unisys.com
*5-03-70-101 VIN #727098 Sytech Solutions 9766 Waterman Road, Suite H Elk Grove, CA 95624 (916) 686-6686 Jonathan Pritt @ jrpitt@sytechsolutions.com	***5-03-70-105 VIN #774329** Wave Imaging Corp. 8805 Research Drive Irvine, CA 92618 (949) 453-9283 Amir Afzali @ aafzali@waveimaging.com

* Certified Small Business Enterprise (SBE)

F.   **STATE OF CALIFORNIA CONTACT**

<u>**Contract Administrator**</u>**:**

Bonnie Bahnsen
DGS, Procurement Division
Multiple Award Program (MAP)
707 3rd Street, 2nd Floor
West Sacramento, CA 95605
Phone: (916) 375-4383
Email: Bonnie.Bahnsen@dgs.ca.gov

CONTRACT GUIDELINES

A. **NEW ORDERS**

Orders can be placed by completing a STD. 65, Contract/Delegation Purchase Order. Detailed instructions on completing the purchase order can be obtained by going the following website:

http://www.documents.dgs.ca.gov/osp/pdf/std065.pdf

Once you have obtained any necessary departmental and agency approvals, COMPLETE THE STD. 65, CONTRACT/DELEGATION PURCHASE ORDER AND, IF APPLICABLE, COMPLETE STATEMENT OF WORK ORDER and mail it directly to the contractor.

Agencies are no longer required to obtain three (3) quotes when ordering from this Master Service Agreement (MSA) when issuing orders up to $500,000. In accordance with Management Memo 03-10, 6(b), this MSA was competitively bid. These User Guide instructions are hereby modified to remove the requirement to achieve further competition; however, agencies are strongly encouraged to optimize the benefits of the MSA program by comparing different authorized contractors for varying products, services and prices to obtain the best value available.

Local Agencies may, in lieu of the State's purchase order forms, use their own purchase order document as long as it includes the same information as that required on the STD. 65, including the Agency Billing Code described below.

B. **DISTRIBUTION**

Two copies of the STD 65 must be sent to DGS; one copy to:

DGS/Procurement Division
Multiple Award Program (MAP)
707 3rd Street, 2nd Floor
West Sacramento, CA 95605

And one copy to:

DGS, CalRIM
Office of State Publishing, IMS P-06
344 North Seventh Street
Sacramento, CA 95811-0212

C. **IMPLEMENTATION PLAN**

Each contractor provided DGS with a copy of their implementation plan methodology. The implementation plan methodology (approach) contains, at a minimum, the following elements: Project Overview, Assumptions and Constraints, Programming Methodology, Integration Methodology, Data Conversion Plan, System Installation Plan, System Rollout Plan, Training Plan, and Software Maintenance. Ordering agencies may contact the contractor(s) to request a copy of the implementation plan methodology (approach) before making a decision to place an order.

D. **STATEMENT OF WORK**

The Statement of Work (SOW) shall be included with the purchase order. At a minimum, the Statement of Work shall contain the following:

1. Project Scope

2. Roles and Responsibilities (Contractor and Government)
3. Tasks and Deliverables
4. Project Schedule (timeframes, schedule, deadline, etc.)
5. Communication Plan (Meetings, Reports, Updates, etc.)
6. Implementation Plan

E.   **FEASIBILITY STUDY REPORT (FSR**)

A feasibility study report (FSR) was developed on this project (procurement) by the agency and approved by the Department of Finance (DOF). If applicable, the governmental agency will make this feasibility study report available for review and analysis. The FSR will assist the contractor in developing an implementation plan.

Note: If a FSR is required for a specific project (procurement), an Information Technology Procurement Plan (ITPP) shall be required also, refer to MM 03-05.

F.   **PER DIEM**

For the purposes of this MSA, the rates for direct expenses on projects (procurements) are not negotiable and set at Department of Personnel Administration (DPA) rules level for State employees current at the time of expense invoicing (DPA rules 599.615 to 599.635).

G.   **TERMINATION**

Any State or local agency may unilaterally terminate any order issued against this agreement upon 30 days notice to the contractor. The contractor shall be compensated at contract rates for work completed and accepted prior to a stop work order or termination notice commencement date. This does not affect the standard termination clause of the Master Services Agreement concerning failure to perform or upon mutual consent.

H.   **AMENDMENTS**

Amendments to the purchase order (STD 65) and statement of work may be issued on an as needed basis.

I.   **AGENCY REPORTING REQUIREMENTS**

If a contractor is either performing in an outstanding manner or if performance problems are encountered, agencies are encouraged to complete a State Agency MSA Contract Performance Report. You will find this report attached to this User Guide. Please send this report to the MSA Contract Administrator.

J.   **PERFORMANCE BONDS**

Some Agencies may require the contractor to secure a performance bond. If so, the contractor, at no cost to the State, shall furnish to the agency, prior to commencement of work, a Faithful Performance Bond in the amount of fifty percent (50%) of the Total Cost shown on the Master Services Agreement Order. The bond shall be on a form from an admitted surety insurer and must guarantee the contractor's compliance with the terms of the purchase order.

K.   **DVBE**

NEW - For information on DVBE, please refer to the State Contracting Manual, Volume III, Section 5.A2.5. You can access it at the following link:
www.documents.dgs.ca.gov/pd/poliproc/Chapter05LPA1-2007.doc

L. **STATE POLICY FOR STATE AGENCIES**

The use of master service agreements is optional.

M. **PROCUREMENT GUIDELINES**

A State or participating local agency may select any contractor(s) listed herein for the required category (ies) of service.

For orders under $500,000, the ordering agency is NOT required to get three (3) quotes. Ordering agencies must follow all applicable state mandated guidelines, e.g., State Administrative Manual, Management Memos, Agency Directives, California Acquisition Manual and California Codes. All state agencies must comply with all the applicable instructions and attachments of Management Memo 03-10 when ordering through the MSA. This includes the requirement that the state agencies must submit a Notice of Contract Award to the DGS within five days of the award for orders over $250,000. Approval by the Agency Secretary and Department Director or immediate next ranking official is also required for orders over $250,000.

For orders over $500,000 under this MSA, the ordering agency is required to obtain quotes from all qualified suppliers within their region and must notify the DGS (DGS MSA Contract Manager) prior to issuance of the purchase order.

1. MSA Exemption Process to the $500,000 threshold: For orders over $500,000, the agency must provide a memo to the DGS prior to the issuance of the purchase order. The DGS will review this information to validate that the agency obtained best value for the State. **The agency documentation should include the following information:**

   a. Identify the need for the goods and/or services and the dollar value of the impending purchase order.
   b. Explain how the department has determined that issuance of a purchase order to this particular contractor makes good business sense and how best value for the department has been achieved.   Include how effective competition to the fullest extent possible will be assured.

   The DGS will review the submitted documentation, and upon agreement with the content, the DGS will issue a letter concurring with the department's recommendation, thereby allowing issuance, by the department, of the purchase order.

N. **INVOICES**

Invoices shall be submitted to the "Mail & Bill To:" address listed on the applicable MSA order, Contract/Delegation Purchase Order, STD 65.

Suppliers received awards by project size (category) and product categories.
Here are the category sizes, product categories, and list of contractors.

(See Glossary of Terms for descriptions of category sizes and product categories)

LIST OF CONTRACTORS

Contractor's Name	Category Size	Product Categories
Aspect Solutions	All	A and B
Biz Tech Solutions, Inc.	All	A, B, C, D, E, F, H, I, J, and K
BMI Imaging	I & II	A, B, E, and H (Cat I)
Documentum, Inc.	All	A, B, C, D, G, H, J, and K
HCL Technologies	All	A, B, C, D, E, and G
Hershey Business Products	I & II	B, C, and G
IBM Corporation	All	A, D, E, F, G, H, I, J, and K
Image Access West, Inc.	All	A (Cat I), C, G and H
ImageSource, Inc.	All	A, B, C, D, E, F, G, H, and K
InfiniSys, Inc.	All	A, B, C (Cat II), D, F, J, and K
Informatix	All	A, B, H, J, and K
Laser Fiche (Compulink)	All	A, B, and C
Matrix Imaging	All	A, B, C (Cat II), E, and H
Neko Industries	All	A, B, C, E, G, and H (Cat I)
Netresult	All	A, B, C, D, E, G, and J
Novanis	I & II	G
Sierra Cybernetics, Inc and K	I & II	A, B, C (Cat I), E, F (Cat III), G, H,
Softfile	I	A
Sytech Solutions	I & II	A, B, E, and H
TsaAdvet	All	A, and B
Unisys Corporation	All	A, B, C, D, E, F, G, H, I, J and K
Wave Imaging Corporation	All	A, B, and H

PUBLISHED PRICE LISTS

The following discounts shall apply to each contractor's respective price list enclosed.

SUPPLIER	PRODUCT DISCOUNT(S)	SERVICES DISCOUNT
ASPECT SOLUTIONS	10%	10%
BIZ TECH	0%	0%
BMI IMAGING SYSTEMS	10%, 20% (H)	10%
DOCUMENTUM, INC.	48% (A-D, H, and J-K) and 0% (G)	18-20%
███████	███	███
HCL TECHNOLOGIES, INC. Cat I	20%	0%
Cat II	23%	0%
Cat III	26%	0%
HERSHEY TECHNOLOGIES	15%	0%
IBM CORPORATION	0%	0%
IMAGE ACCESS WEST, INC. Cat I	10% (A, H)	0%
Cat II & III	15% (C, G) and 10% (H)	0%
IMAGESOURCE, INC.	5%	0%
INFINISYS, INC.	5% (A-D and J-K) and 0% (F)	0%
INFORMATIX	20%	0%
LASERFICHE	0%	0%
MATRIX IMAGING	21%	0%
NEKO INDUSTRIES	10%	0%
NETRESULT	5%	0%
NOVANIS	0%	0%
SIERRA CYBERNETICS, INC.	5%	15%
SOFTFILE	25%	0%
SYTECH SOLUTIONS	10%	0%
TSAADVET	10%	0%
UNISYS CORPORATION	10-48% (A-C), 15-48% (D, I-K), 0-15% (E, G), 0% (F), AND 0-48% (H)	25%
WAVE IMAGING CORPORATION	25%	0%

STATE AGENCY MSA CONTRACT PERFORMANCE REPORT

1.   GENERAL INFORMATION

Date: _____

Agency Name: _____   Contractor Name: _____

Contact Person: _____   Order Number: _____

Phone Number: _____

2.   OUTSTANDING PERFORMANCE

Have you hired this Contractor previously?   Yes _____   No _____

Provide a brief explanation of the situation and what was done by the Contractor that made their work outstanding:

_____
_____
_____
_____
_____
_____
_____
_____

3.   PROBLEM REPORTING

Has the problem been resolved?   Yes _____   No _____

Provide a brief explanation of the situation that resulted in the problem:

_____
_____
_____
_____
_____
_____
_____

Discuss what has been done by the Contractor and your Agency to resolve the problem:

_____
_____
_____
_____
_____
_____
_____

CONTRACT LANGUAGE
TERMS AND CONDITIONS

All of the contractors have agreed to the following contract language:

1. General Provisions, dated 3/01/03, 10 Pages

    Go to website link to download language:

    http://www.documents.dgs.ca.gov/pd/modellang/generalit.pdf

2. Information Technology Software License Special Provisions, dated 1/21/03, 3 Pages

    Go to website link to download language:

    http://www.documents.dgs.ca.gov/pd/modellang/softwarespecial012103.pdf

3. Information Technology Purchase Special Provisions, dated 1/21/03, 2 Pages.

    Go to website link to download language:

    http://www.documents.dgs.ca.gov/pd/modellang/purchsespecial012103.pdf

4. Information Technology Personal Services Special Provisions, dated 1/21/03, 5 Pages

    Go to website link to download language:

    http://www.documents.dgs.ca.gov/pd/modellang/personalservicespecial012103.pdf

CATEGORY SIZES AND PRODUCT CATEGORIES

CATEGORY SIZES

There Are Three (3) Category Sizes:

Category I (1-30 client or server licenses)

Category II (31-150 client or server licenses)

Category III (151 or more client or server licenses)

PRODUCT CATEGORIES

PRODUCT CATEGORY A - ELECTRONIC DOCUMENT IMAGING

Electronic document imaging shall mean the storage and retrieval of all bitmap documents, regardless of electronic file format (i.e., tiff, etc.). Storage and retrieval shall include various aspects of repository management and database strategies for scaleable document imaging solutions.

PRODUCT CATEGORY B - ELECTRONIC DOCUMENT MANAGEMENT

Electronic document management shall mean the management of electronic documents, regardless of electronic file format (i.e., tiff, MS Word, email, etc.) , utilizing various methodologies to manage all documents generated by multiple software applications, topologies and architectures throughout LAN/WAN/WEB environments.

PRODUCT CATEGORY C - ELECTRONIC WORKFLOW

Electronic workflow shall mean the automation of business processes in an electronic environment employing various methodologies and strategies for enabling increased productivity, accountability, and reliability. Implementing technologies include: business process analysis and modeling software tools, workflow design software tools, workflow integrating software tools, workflow management software tools, and the resources to support these technologies.

PRODUCT CATEGORY D – RECORD CENTER MANAGEMENT

Record center management product shall mean specialized software for management of physical records and/or record centers. Functionality shall include, but not necessarily be limited to, electronic management of physical documents utilizing approaches such as bar code labels or color top/end-tab file folder labels, document or container (e.g., file) check-in and check-out, and document location.

PRODUCT CATEGORY E – COMPUTER OUTPUT TO LASER DISK (COLD)/ENTERPRISE REPORT MANAGEMENT (ERM)

Computer output to laser disk shall mean the storage and retrieval of data which is then organized to fit various electronic report formats/templates.

PRODUCT CATEGORY F – DATABASE MANAGEMENT SYSTEMS

Database management systems shall mean all database functionality meeting industry data management standards and/or acceptable industry practices, including but not limited to database inter-connectivity, for the storage and manipulation of data.

PRODUCT CATEGORY G - ELECTRONIC FORMS SOFTWARE

Electronic forms software shall mean forms created, routed, and/or managed by software specifically designed to provide electronic data/document capture through an electronic form. This can be accomplished by either an integrated workflow automation system or by providing a workflow engine internal to the electronic forms software application.

PRODUCT CATEGORY H – CAPTURE SUB-SYSTEMS SOFWARE

Capture sub-systems software shall mean software that is a complete capture sub-system, e.g., specialized for design and capture of multifaceted document prep, scan, quality assurance, data index/capture/classification, data verification, document migration functioning as a separate yet supportive software application, for integration into a document imaging, document management and/or workflow automation system, etc.

PRODUCT CATEGORY I – CLASSIFICATION AUTOMATION SOFTWARE

Classification automation software shall mean specialized software for the automatic classification and indexing of documents and/or data. Functionality shall include, but not necessarily be limited to, electronic classification of documents utilizing approaches such as classification (perhaps including grammatical knowledge) rules based evaluation of document meta data and text content/context.

PRODUCT CATEGORY J – ELECTRONIC RECORDKEEPING SYSTEM SOFTWARE

Electronic recordkeeping system software shall mean specialized software for management of physical records together with the management of electronic documents, regardless of electronic file format (i.e., tiff, MS Word, email, etc.) , utilizing various methodologies to manage all documents generated by multiple software applications, topologies and architectures throughout LAN/WAN/WEB environments. Additional functionality shall include, but not necessarily be limited to, electronic management of all records information management (records retention and disposition management) regardless of storage medium or location. Electronic Recordkeeping Software may also provide for the automation of records classification and indexing.

PRODUCT CATEGORY K – RECORDS INFORMATION MANAGEMENT SOFTWARE

Records information management software shall mean specialized software for electronic management of records information management, e.g., records retention and disposition management, within one or more storage mediums and/or locations.

SUPPORT SERVICES

PROGRAMMING

Programming shall include all generation of code, either via the contractor or through third party providers, which is created or employed in providing document imaging, document management, and workflow implementation services.

INTEGRATION

Integration services refers to the integration of various software and hardware components (products and services) in order to provide a customized solution utilizing "best of breed" product types to meet specific needs of the governmental agency.

INSTALLATION

Installation shall include all installation and testing of each automation component and all components working together consistent with the goals of the FSR, the Implementation Plan and the deliverables itemized in the workorder.

TRAINING

Training shall include all training necessary to bring staff to a proficient level of expertise in the operation of each automation component and all components working together consistent with the goals of the FSR, the Implementation Plan and the deliverables itemized in the workorder.

MAINTENANCE

Maintenance shall include all necessary maintenance to maintain the reliable performance of each automation component and all components working together consistent with the goals of the FSR, the Implementation Plan and the deliverables itemized in the workorder.

GLOSSARY OF TERMS

ACCESSION - The initial placement of the assigned shelf location at the State Records Center (SRC).

ADF - Automatic Document Feeder on scanner equipment.

AIIM - Association for Information and Image Management International, A membership organization founded in 1943 devoted to creating industry standards and disseminating information about the document management industry.

ANALOG - Representation in a form similar to the source (e.g. paper to microfilm vs. paper to digital (Tiff)).

ANSI - American National Standards Institute. A membership organization founded in 1918 that coordinates the development of U.S. voluntary national standards in both the private and public sectors. It is the U.S. member body to ISO and IEC.

APERTURE OR APERTURE CARD - Aperture card. 35mm microform frame inserted into an IBM punch card with index information punched into the card.

API Application Program Interface - Any language and format used by one program to help it communicate with another program. An application software provides API's that enable programmers to repackage or recombine parts of the application's functions, or integrates the application with other applications, or to customize the user interface to that application.

ARCHITECTURE - How a system has been designed and the components connected together. (Software, Hardware, Networks, etc.)

ARCHIVAL QUALITY - The reliability of a storage medium to be able to reproduce a representative copy of an image. Archive expectations differ, but archival quality media should provide safe storage for at least 50 years.

Banyan VINES – Virtual Networking System. AUNIX V-based network operating system from Banyan Systems Inc. that runs on DOS and OS/2-based servers.

BATCH - Bundling work in groups for high volume processing through a series of tasks (preparation, scanning, indexing, etc.)

BMP - (BitMaP file) Also known as a "bump" file, it is a Windows and OS/2 bitmapped graphics file format

BORDER CONTROL - Controlling the frame size of the scanned image such that a minimum amount of background is visible outside the edge of the image being captured.

BRIGHTNESS - The reflectiveness of an overall image, including both light and dark areas.

CAR Computer Assisted Retrieval - Computer systems that locate or identify data stored on stored on microform or paper and/or assist in the retrieval.

CLASSIFICATION - The systematic identification and arrangement of information, as opposed to indexing with is the location reference.

COLD Computer Output to Laser Disc - Coded data (e.g. ASCII databases) generated by a host computer stored on optical disc. COLD replaces COM as a mainframe storage medium.

COM Computer Output to Microform - The process of converting data to microfilm or microfiche.

CONTRAST - The degree of difference between the lightest and darkest tones in an image.

CONVERSION - The conversion of images in one medium type to images of a different medium type.

DATA CAPTURE - The systematic extraction of data from various media. (Key Data Entry, Barcode recognition, OCR, mark sense recognition, etc.)

DATA WAREHOUSE - An archival database, as opposed to operational database.

DATABASE (OPERATIONAL) - The database(s) used in the day-to-day business of an enterprise.

DATABASE DESIGN - The design of a data model for deployment to database.

DATABASE MAINTENANCE - Maintaining the structural (data) integrity of a database, together with various modification of the database as it may relate to a changing data model.

DATABASE MODELING - The construction of various data scheme that models the database capacity to meet the requirements of a business process in an enterprise.

DENSITY - Degree of darkness of an image as measured by a densitometer.

DESTINATION MEDIUM - The medium into which an image is being converted.

DIAZO - A type of film and a process in micrographics by which a film copy is made of an original with the same polarity (negative to negative).

DIGITAL- Binary code used to record information, as opposed to analog. Tiff images are digital and film images are analog.

DPI Dots Per Inch - A measurement of scanner resolution. The number of pixels a scanner can physically distinguish in each vertical and horizontal inch of an original image.

DUPLEX - The ability of the scanner to scan both sides of a sheet simultaneously. Requires two scanner heads for two sides to be captured in one pass.

ELECTRONIC DOCUMENT IMAGING - The capture, storage and retrieval of scanned images (primarily bitmaps) maintained in an electronic format accessible to one or more computers.

ELECTRONIC DOCUMENT MANAGEMENT - The indexing and intelligent retrieval of documents (correspondence, spreadsheets, scanned images, etc.) maintained in an electronic format accessible to one or more computers.

ELECTRONIC FORMS - Graphics merged electronically with data to enable the user to fill out a form on the computer screen for subsequent routing for further action.

EPS Encapsulated PostScript - A PostScript file format used to transfer a graphic image between applications and platforms.

ERM Enterprise Report Management – Manages unstructured and semistructured computer-generated output. ERM is sometimes called computer output to laser disk (COLD) technology.

FILE- A collection of documents (one or more images) contained within a unique record.

FORMS RECOGNITION - In OCR, the ability to recognize a specific type of document and to then accurately extract data from that form in predictable locations.

FRAME CONTROL - The ability of a system to automatically adjust the frame size of an image consistent with the image border demands.

FSR Feasibility Study Report - FSR's are required by the State of California before an agency or department can proceed to implement any electronic document system.

GRAYSCALE - The range of shades of black an image has, measured from zero for black and some other number (often 255) for white. A grayscale image allows for greater image adjustment post scan than a black and white image resulting in greater post scan viewing flexibility for a widely varying source image population.

HSM Hierarchical Storage Manager - Software used in the storage and retrieval of images on optical jukeboxes.

HYBRID SYSTEMS - Electronic Document Imaging and Workflow Systems which meet few industry standards or norms, but for one or more reasons are required in order for a business process within an enterprise.

ICR Intelligent Character Recognition or Image Character Recognition - The machine recognition of hand-printed characters as well as machine printing that is difficult to recognize.

IDENTIFICATION SHEETS - Paper sheets containing bar codes or other machine-readable information for postscan identification by specialized recognition software.

IMPLEMENTATION - To carry out or put into place a final automation plan consistent with an approved Feasibility Study Report.

IMPLEMENTATION PLAN - A plan to be submitted by the contractor to the governmental agency detailing the implementation of the approved FSR "proposed solution". In considering that solution, contractor's recommendations may provide for substitutions and/or enhancements, consistent with the specified total estimated costs within the FSR. Contractors will be required to submit an "implementation plan" in response to a request by any agency using this MSA. The implementation plan must follow guidelines established by this MSA and detail the cost, time, and all products and/or services.

INDEXING - Establishing one or more references to information which has been previously identified (or classified).

INTERFILE - The placing of new files or refiles in an existing file inventory.

IPX/SPX – Internetwork Packet Exchange/Sequenced Packet Exchange

JDBC - (Java DataBase Connectivity) A programming interface that lets Java applications access a database via the SQL language

JOB - A specific task or project.

JPG - Graphics file type/extension (lossy compressed 24 bit color image storage format developed by the Joint Photographic Experts Group)

JUKEBOX - A device that holds multiple optical discs and one or more disc drives, and can swap discs in and out of the drive as needed. Also called a "near-line" category of storage.

KDE Key data entry - Manual data input by key data entry operators.

LABELING - Application of a label providing classification and/or indexing information.

LAN Manager - A network operating system from Microsoft that runs as a server application under OS/2. It supports both DOS, Windows and OS/2 clients. LAN Manager was superseded by Windows NT Server, and many parts of LAN Manager are used in NT.

LFI Linear File Inches - A measurement of files on a shelf or in a file cabinet that is used estimating many different aspects of record keeping (i.e. quantity of shelving required, images per file inch in electronic conversions of existing paper files for inclusion in an electronic document system).

MAPI – (Mail API) A programming interface from Microsoft that enables a client application to send to and receive mail from Exchange Server or a Microsoft Mail (MS Mail) messaging system. Microsoft applications such as Outlook, the Exchange client and Microsoft Schedule use MAPI.

MSA - Master Service Agreement as defined in the body of this RFP.

NetBeui – NetBIOS Extended User Interface

OCR Optical Character Recognition - Software with the ability to recognize and translate bitmapped scans or faxes of printed alphanumeric (or other specialized) characters into machine-readable (ASCII or formatted) text.

ODBC (Open DataBase Connectivity) - A database programming interface from Microsoft that provides a common language for Windows applications to access databases on a network. ODBC is made up of the function calls programmers write into their applications and the ODBC drivers themselves

OLE DB - OLE DB is Microsoft's strategic low-level interface to data across the organization. OLE DB is an open specification designed to provide an open standard for accessing all kinds of data.

OMR - Optical Mark Reader - A scanner that reads marks on specific areas of the page.

OPEN - Non-proprietary, utilizing current industry standards ensuring inter-connectivity between applications adhering to those standards

PATTERN RECOGNITION - An OCR technique. The use of libraries of information about how characters are built - artificial intelligence experts - in all fonts and sizes. Also called *feature extraction*, because the experts examine certain parts, or features, of the characters and cumulatively agree on whether the character meets enough criteria to identify it as one character or another.

PHYSICAL DOCUMENT TRACKING - Software that tracks the location and other data relating to an object (e.g. paper file folders, documents, boxes, desks, etc.) by use of one or more machine readable identifying tags (e.g. bar codes, magnetic strips, etc.) and interfaces with an electronic document imaging (workflow, management, etc.) system, linking the physical items to the related electronic items.

PDF -Portable Document Format - The page description language used in the Acrobat document exchange system. PDF files have become a de facto standard for transmitting documents to commercial printers and to the Web for online publishing.

PPM Pages Per Minute - The rated throughput of a scanner (printer, etc.).

PPTP Point-to-Point Tunneling Protocol - A protocol that encapsulates other protocols for transmission over an IP network. For example, it can be used to send NetWare IPX packets over the Internet. Due to its RSA encryption, PPTP is also used to create a private network (VPN) within the public Internet. Remote users can access their corporate networks via any ISP that supports PPTP on its servers.

PRODUCT - Anything connected with this MSA that is not a service.

PROGRAMMING - The writing of programming code for integration of products under this MSA.

PURGING - The systematic removal of documents from a given population of source or converted images.

RAD - Rapid Application Development.

RESOLUTION - The number of dots (dpi) that make up an image on a screen or printer. The ideal resolution is a trade-off between image quality and the overhead in storage power and processing strength (which translates to cost) required to use it.

SERVER SECURITY - Ensuring security relating to the actual data or private HTML files stored on the server.

SERVICE - A service under this MSA is the definition used by the California Department of General Services.

SESSION SECURITY - Ensuring that data is not intercepted as it is broadcast over the Internet or Intranet.

SILVER - A type of film used in microform in photographing an original film image (as opposed to diazo).

SOURCE MEDIUM - The medium of the source images (e.g. paper) prior to conversion to another medium.

SRC State Records Center - The State Records Center is located in West Sacramento, California. This center is a California State Government facility providing storage and retrieval services for "inactive" records, together with certified document destruction.

SRC STORAGE NUMBER -State Records Center number for the fixed physical location of a 1.2 cubic foot storage box. This number therefore becomes the box number.

STANDARD GROUP FOUR TIFF- Standard compression algorithms, set by the CCITT for fax, used in conjunction with Tagged Image File Formatting (a bitmap file format invented by Aldus for describing and storing color and grayscale images).

SYMMETRICAL MULTI-PROCESSING - Program utilizes multi-tasking and multi-threading in such a manner as to automatically load level over two or more processors in an operating environment such as Unix or Windows NT.

TCP/IP Transportation Control Protocol/Internet Protocol - A communications protocol developed to internetwork dissimilar systems. This de facto UNIX standard is the protocol of the Internet and has become the global standard for communications.

THRESHOLD DETECTION - The scanner software detection of pixels at varying levels enabling the capture of only images which meet certain minimum criteria, and the discarding of those that are of insufficient pixel number.

TIFF Tagged Image File Format - A bitmap file format, invented by Aldus, for describing and storing color, grayscale, and black and white electronic images.

TRAINING - The instruction in the operation of various service or product components under this MSA..

TRC Technical Response Certification form - This form is included in the bid package for all bidders to use in the certification of the various technical requirements.

USER-AUTHENTICATION SECURITY - Ensuring login security that prevents unauthorized access to information.

VIM (Vendor Independent Messaging Interface) - A programming interface developed by Lotus, Novell, IBM and others. In order to enable an application to send and receive mail over a VIM-compliant messaging system such as cc:Mail, programmers write to the VIM interface.

VPN Virtual Private Network - A private network that is configured within a public network.

WMF - Windows Metafile

WORKFLOW - Automating the orderly procedures for handling business processes. Workflow systems are usually based on electronic versions of documents - how they are routed through departments in a company; which transactions have to be accomplished in which order, what to do about executions and mistakes - are all workflow concerns. Among the many tasks performed, workflow software generally schedules processing, routes documents automatically among users and tracks document status.